


Portfolio

Wisconsin Cooperative Education Skill Certification Professional Sales

Coop Areas Completed	Student Information
Economic Foundations 20 Communications and Interpersonal Foundations 31 Professional Development 10 Marketing, Management and Entrepreneurial Foundations 28 Customer Service 22 Sales 29 Inventory Management 25	<div data-bbox="869 542 1873 574"> <div>Student</div> <div>Phone</div> </div> <div data-bbox="869 639 1873 672"> <div>School</div> <div>Phone</div> </div> <div data-bbox="869 737 1873 769"> <div>Teacher Coordinator</div> <div>Phone</div> </div> <div data-bbox="869 818 1873 850"> <div>Workplace Mentor</div> <div>Phone</div> </div>
<div data-bbox="239 1187 785 1349"> <div>Start Date</div> <div>End Date</div> </div>	<div data-bbox="869 932 1415 1370"> Other Information: </div> <div data-bbox="1436 948 1877 1354">  </div>

Professional Sales Skill Standards Rating Scale

- 3 Proficient—able to perform entry-level skills independently.
 2 Intermediate—has performed task; may need additional training or supervision.
 1 Introductory—is familiar with process but is unable, or has not had the opportunity, to perform task; additional training is required.
SB School Based
WB Work Based

WB	Work Based	Rating			Initials		Comments
		3	2	1	SB	WB	
Economic Foundations							
18 competencies must be achieved at level 2 or 3							
1. Distinguish between economic goods and services							
2. Explain the concept of economic resources							
3. Describe the nature of economics and economic activities							
4. Determine forms of economic utility created by economic activities							
5. Describe the principles of supply and demand							
6. Describe the concept of price							
7. Explain how price is impacted by the interaction of supply and demand							
8. Explain the types of economic systems							
9. Explain the relationship between government and business							
10. Explain the concept of private enterprise							
11. Determine factors affecting a business's profit							
12. Explain the concept of competition							
13. Explain the concept of productivity							
14. Explain the concept of organized labor and business							
15. Explain the measures used to analyze economic conditions such as Consumer Price Index and Gross Domestic Product							
16. Analyze current economic problems							
17. Examine the nature of international trade							
18. Identify the impact of cultural and social environments on world trade							
19. Evaluate the influences on a nation's ability to trade							
20. Analyze a country's cultural, political, economic and demographic environments							

Communications and Interpersonal Foundations

28 competencies must be achieved at level 2 or 3

1. Explain the nature of effective communications (verbal, written)						
2. Apply effective listening skills						
3. Use proper grammar and vocabulary						
4. Handle telephone calls in a businesslike manner						
5. Write business letters, informational messages and inquires						
6. Use communications technologies/systems (e.g., e-mail, faxes, voice mail, cell phones, etc.)						
7. Convince others of a point of view						
8. Make oral presentations						
9. Prepare simple written reports						
10. Explain the use of inter-departmental/company communications						
11. Demonstrate basic word processing skills						
12. Demonstrate basic word presentation software skills						

Description of Skills	Rating			Initials		Comments
	3	2	1	SB	WB	
13. Demonstrate basic database skills						
14. Demonstrate basic spreadsheet skills						
15. Demonstrate basic search skills on the web						
16. Identify desirable personality traits important to business						
17. Maintain positive attitude						
18. Demonstrate responsible behavior, honesty and integrity						
19. Recognize personal biases and stereotypes						
20. Demonstrate work ethics						
21. Demonstrate self-control						
22. Explain the concept of self-understanding and self-esteem						
23. Use feedback for personal growth						
24. Adjust to change						
25. Make decisions						
26. Set personal and professional goals						
27. Develop cultural sensitivity						
28. Participate as a team member						
29. Explain the concept of customer service						
30. Demonstrate problem-solving skills						
31. Interpret business policies to customers/clients						

Professional Development

9 competencies must be achieved at level 2 or 3

1. Assess personal interests and skills needed for success in marketing and business						
2. Analyze employer expectations in the business environment						
3. Explain the rights of workers						
4. Explain employment opportunities in marketing and business						
5. Utilize job search strategies						
6. Complete the job-seeking process						
7. Explain the need for ongoing education as a worker						
8. Explain possible advancement patterns for jobs						
9. Develop an individual professional portfolio						
10. Utilize resources that can contribute to professional development (e.g., trade journals/periodicals, professional/trade associations, classes/seminars, trade shows)						

Marketing, Management and Entrepreneurial Foundations

25 competencies must be achieved at level 2 or 3

1. Explain marketing and business and its importance in a global economy						
2. Describe marketing functions and related activities						
3. Explain the nature and scope of purchasing						
4. Explain company buying and purchasing policies						
5. Explain the concept of production						
6. Explain the concept of accounting						
7. Calculate net sales						
8. Describe the nature of cash-flow statements						

Description of Skills	Rating			Initials		Comments
	3	2	1	SB	WB	
9. Prepare a profit and loss statement						
10. Explain the concept of finance						
11. Explain the concept of management						
12. Contrast management styles and practices						
13. Describe the nature of budgets						
14. Describe the crucial elements of TQM culture						
15. Explain the nature of continuing improvement strategies						
16. Explain the types of business ownership						
17. Describe current business trends						
18. Identify the ways that technology affects marketing and business						
19. Explain basic types of business risk						
20. Describe the concept of insurance						
21. Explain routine security precautions						
22. Open and close a business facility						
23. Follow safety precautions						
24. Explain procedures of handling accidents						
25. Explain the nature of legally binding contracts						
26. Orient new employees						
27. Explain the nature of overhead and operating costs						
28. Describe planning tools used by management (budgets, forecasts, financial statements, schedules) to control operations						

Customer Service

20 competencies must be achieved at level 2 or 3

1. Review company-initiated training to support product knowledge						
2. Read and report on company flyers and trade magazines						
3. Attend and report on company seminars, training and other meetings						
4. Test and sample products and services						
5. Study competitors products and services						
6. Study competitors' marketing materials (ads, fliers, commercials, web pages, etc.)						
7. Acknowledge and greet customer in person						
8. Acknowledge and greet customer by answering the telephone or by using appropriate computer technology						
9. Establish positive, trusting relationship with customer by assessing customer's personality, mood and motivation and adjust approach/language accordingly						
10. Gather information about customer's needs by asking appropriate questions and respond appropriately to customer's comments						
11. Gather information about customer's product/service knowledge						
12. Determine customer's financial parameters						
13. Explain and demonstrate product/service and costs to customer clearly and thoroughly						
14. Respond positively and directly to customer's questions and objections						
15. Identify all alternative or additional products/services available within department/store/company						
16. Inform customer about service policies (warranties, guarantees)						

Description of Skills	Rating			Initials		Comments
	3	2	1	SB	WB	
17. Solicit coworker or management support and advice when necessary to meet customer needs						
18. Present alternate resources outside company to customer and any other explanatory information needed to connect customer with resource						
19. Address customers comments/questions/objections with accurate information about the service/product						
20. Handle sales transactions						
21. Deliver promised product or service and coordinate as needed with other services to expedite delivery of service or product						
22. Contact customer in a timely, sincere manner to determine if product/service meets customers expectations						

Sales

26 competencies must be achieved at level 2 or 3

1. Review company-initiated training to support product						
2. Read company flyers and attend company seminars, training and meetings, read trade magazines						
3. Test and sample product/services						
4. Study competitors' products/services: study competitor's marketing materials (ads, fliers, TV commercials, web pages, etc.)						
5. Review past sales goals and activities and establish achievable future sales goals						
6. Develop and implement strategy for providing products/services						
7. Develop and implement marketing/merchandising plan for promotion of products/services						
8. Familiarize self with pricing strategies						
9. Continually identify and target marketing areas with high probability of sales						
10. Identify and prioritize potential customer base within market target area						
11. Prospect for customers in market target areas						
12. Assess customer needs						
13. Analyze customer response to suggestions and respond appropriately addressing customer objections, reservations or unrealistic expectations						
14. Observe customer and/or listen for signs he/she is ready to complete sale						
15. Suggest completion of the purchase to the customer						
16. Engage in appropriate negotiation process						
17. Reinforce/validate sales with customer						
18. Discuss specifics of the sale (delivery and/or installation date, warranties, product protection plan)						
19. Address customer's comments/questions/objections with accurate information about the service/product.						
20. Handle sales transaction.						
21. Deliver promised product or service and coordinate as needed with other services to expedite delivery of service or product (ex: tailoring, manicure/facial/pedicure)						
22. Contact customer in a timely, sincere manner to determine if product/service meets customer's expectations.						
23. If customer's expectations not met confirm procedure/process that will satisfy customer's needs and facilitate resolution process.						
24. Follow up with customers regarding future suggestions and alternatives.						
25. Maintain contact with customers through correspondence, phone calls and casual contacts in community.						
26. Convert returns to exchanges, rejections and lost sales to new sales.						
27. Evaluate and analyze effectiveness of prospecting methods from follow-up, and through analysis of customer comments and relationship to sales performance						
28. Evaluate strategy for providing products/services						

Description of Skills	Rating			Initials		Comments
	3	2	1	SB	WB	
29. Evaluate marketing/merchandising plan for promotion of products/services.						

Inventory Management

23 competencies must be achieved at level 2 or 3

1. Unload container from carrier in a proper and timely manner						
2. State container safely and in the proper location						
3. Report receipt of product to appropriate individuals or enter information into inventory system						
4. Identify and report damaged products to the appropriate individual(s) using the necessary paperwork						
5. Verify container against shipping documents and report and note any discrepancies in location, quantity and type of ordered product						
6. Break down product container in a safe and timely manner without damaging goods						
7. Determine the correct location of products within system and place them according to procedures						
8. Locate and record a new product location for products if primary location is full						
9. Pick products and organize them for packing in shipping containers						
10. Inspect picked orders for correct count according to order specifications and for damage						
11. Wrap, package and label goods to meet special customer requirements and/or packing standards while protecting quality of product						
12. State order according to delivery method and record in tracking system						
13. Store orders safely and in the proper location for transfer to shipping						
14. Prepare shipment according to carrier requirements						
15. Complete and review paperwork according to company policy						
16. Load carrier in manner that prevents damage and according to delivery route						
17. Inspect shipment carefully for damage, proper packing, etc. after loading and before shipping to customer						
18. Assure that delivery is prompt, efficient and that quantity and type of product delivered are correct						
19. Advise customers (both internal and external) of any situations or conditions that will interfere with the prompt and safe delivery of product						
20. Check inventory on a periodic basis ensuring that shelves are clean, neat and free of damaged goods						
21. Replenish locations in a timely fashion by initiating ordering process for new merchandise or by taking product out of storage						
22. Investigate and resolve inventory discrepancies in a timely manner in order to prevent loss due to shrinkage, shoplifting, spoilage, mishaps or fraud						
23. Inform appropriate individual or department about which product is not moving and what product is moving						
24. Rotate stock to dispose of outdated product following company guidelines and government regulations						
25. Remove recalled items promptly according to manufacturer's/supplier's/company's recall policy						

The Competencies in This Portfolio Have Been Endorsed By:



Wisconsin DECA



Wisconsin Association for
Leadership in
Education and Work



Wisconsin
Manufacturers
and Commerce



Wisconsin Association for
Career and Technical
Education



Wisconsin Marketing
Education Association



Wisconsin
Technical College System

***Milwaukee Sales
and Marketing
Executives***

***Sales and Marketing
Executives
of Wisconsin***



Wisconsin
Department of Public
Instruction